**Performance Monitoring Template**

**Project Title:**

*(e.g., "Monitoring Patient Wait Times to Ensure Sustained Improvement")*

**Monitoring Period:**

*(e.g., "Monthly Review for 6 Months")*

**Goal/Aim:**

*(e.g., "Maintain a 20% reduction in patient wait times and improve overall patient satisfaction.")*

| **Performance Metric** | **Target** | **Current Performance** | **Person Responsible** | **Monitoring Frequency** | **Status** | **Notes** |
| --- | --- | --- | --- | --- | --- | --- |
| **1. Patient Wait Times** | 20% reduction in average wait times | *Enter current data* | Clinic Manager | Weekly | *Enter status* | *Notes on changes or trends* |
| **2. Patient Satisfaction** | Satisfaction scores of 9/10 or higher | *Enter current data* | Front Desk Team | Monthly | *Enter status* | *Any feedback from patient surveys* |
| **3. Appointment No-Shows** | No-show rate reduced by 15% | *Enter current data* | IT and Administrative Staff | Monthly | *Enter status* | *Track effectiveness of SMS reminders* |
| **4. Staff Efficiency** | 90% adherence to new intake process | *Enter current data* | Office Manager | Bi-Weekly | *Enter status* | *Notes on training improvements or issues* |
| **5. Treatment Time** | Maintain or improve treatment time consistency | *Enter current data* | Head of Clinical Operations | Weekly | *Enter status* | *Track efficiency in room turnovers* |

**Instructions for Using the Performance Monitoring Template**

1. **Performance Metric**:
	* List the **specific metrics** you are tracking to ensure that the improvements are sustained (e.g., patient wait times, staff efficiency, patient satisfaction).
2. **Target**:
	* Define the **target** for each metric based on the improvement goal (e.g., 20% reduction in wait times, 90% adherence to new processes).
3. **Current Performance**:
	* Record the **current performance** data for each metric (e.g., average patient wait time, satisfaction scores).
4. **Person Responsible**:
	* Assign a **responsible person** or team to each metric to ensure accountability for monitoring performance.
5. **Monitoring Frequency**:
	* Define how often the performance will be **monitored** (e.g., weekly, monthly, bi-weekly).
6. **Status**:
	* Track the **status** of each metric, indicating whether the target is being met, and if not, what adjustments are being made.
7. **Notes**:
	* Add **notes** on any trends, issues, or feedback that could affect performance, as well as any corrective actions being taken.

**Example of a Completed Performance Monitoring Template**

**Project Title:**

Monitoring Patient Wait Times to Ensure Sustained Improvement

**Monitoring Period:**

Monthly Review for 6 Months

**Goal/Aim:**

Maintain a 20% reduction in patient wait times and improve overall patient satisfaction.

| **Performance Metric** | **Target** | **Current Performance** | **Person Responsible** | **Monitoring Frequency** | **Status** | **Notes** |
| --- | --- | --- | --- | --- | --- | --- |
| **1. Patient Wait Times** | 20% reduction in average wait times | 18% reduction | Clinic Manager | Weekly | Slightly below target | Minor delays during peak hours noted |
| **2. Patient Satisfaction** | Satisfaction scores of 9/10 or higher | 8.5/10 | Front Desk Team | Monthly | Improving | Feedback suggests shorter wait times help |
| **3. Appointment No-Shows** | No-show rate reduced by 15% | 12% reduction | IT and Admin Staff | Monthly | Near target | SMS reminders showing effectiveness |
| **4. Staff Efficiency** | 90% adherence to new intake process | 85% adherence | Office Manager | Bi-Weekly | On track | Continued staff training recommended |
| **5. Treatment Time** | Maintain or improve treatment time consistency | Treatment times stable | Head of Clinical Operations | Weekly | On target | Room turnover rates consistent |

**How to Use This Template**

1. **Set Clear Targets**: Define what success looks like for each improvement area, ensuring the goals align with osteopathic principles of holistic, patient-centered care.
2. **Assign Responsibility**: Ensure each metric has a person or team responsible for monitoring progress and taking corrective action if needed.
3. **Monitor Regularly**: Regular monitoring ensures that improvements are sustained and gives you the opportunity to adjust processes if performance starts to decline.
4. **Take Action When Needed**: Use the notes and status sections to document any trends, issues, or areas for improvement, and adjust your approach as needed to keep improvements on track.

**Why This Performance Monitoring Template is Useful**

* **Ongoing Improvement**: This template helps you keep track of whether changes made in your practice are lasting and effective.
* **Accountability**: By assigning responsibilities and tracking performance regularly, it ensures that each area of improvement is continually monitored.
* **Aligned with Holistic Care**: The template focuses on maintaining improvements that enhance not only operational efficiency but also the quality of patient care in a holistic manner.
* **Data-Driven Adjustments**: Provides a structured approach for making data-driven decisions to sustain improvements.